MAYOR'S OFFICE - Record Retention Schedule

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Sub-Department

/MO/CR/ Community Relations

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-CR-	MAYOR'S OFFICE - COMMUNITY RELATIONS			
MO-CR-0001-	CITIZEN COMPLAINTS - EVENT DATE REQUIRED - HOLD ON SITE EVENT IS RESOLUTION OF COMPLAINT Records of complaints of citizens concerning the administration, operation or services of City government, including referrals to responsible department and follow-up to resolution.			ACT+4
MO-CR-0002-	CONSUMER COMPLAINTS - EVENT DATE REQUIRED - HOLD ON SITE EVENT IS RESOLUTION OF COMPLAINT Records of complaints of citizens concerning quality of service, merchandise or workmanship of private businesses operating in the City.			ACT+4

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Sub-Department

/MO/CS/LR/ Labor Relations

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-LR-	**MAYOR'S OFFICE - CHIEF OF STAFF - LABOR RELATIONS** NOTE; The record series listed were previously under the Personnel Dept. schedule, but were moved under the Mayor's Chief of Staff at the direction of the Labor Relations department in June 2011.			
MO-LR-0001-	**LABOR RELATIONS GRIEVANCES - CONFIDENTIAL** Labor relations grievances excepting EEO that may include investigation records, hearing proceedings, decisions rendered by employer, employee appeal, records of arbitration proceedings final decisions and related correspondence.	**Y**		**CLO+8**
MO-LR-0002-	**UNION CONTRACT NEGOTIATIONS** Records documenting the formation and negotiation of contracts with City's four unions.			**CLO+8**
MO-LR-0003-	**ARBITRATION CASES** Case files for labor relations grievances that go to binding arbitration, including related correspondence, dismissal or suspension papers, testimony and settlement agreements			**CLO+8**
MO-LR-0004-	**UNFAIR LABOR PRACTICE CHARGES - HOLD ON SITE** Case files for unfair labor practice charges against the City			**CLO+1**

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Sub-Department

/MO/ED/ Education and Scholarship

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-ED-	**MAYOR'S OFFICE - EDUCATION AND SCHOLARSHIP**			
MO-ED-0001-	**MAYOR'S SCHOLARSHIP FILES - EVENT DATE REQUIRED - HOLD ON SITE** EVENT IS GRADUATION OF APPLICANT Files of successful applicants for Mayor's scholarships, including application, announcement of award and related correspondence.			**ACT+2**
MO-ED-0002-	**MAYOR'S SCHOLARSHIP - UNSUCCESSFUL APPLICANTS - EVENT DATE REQUIRED - HOLD ON SITE** EVENT IS DATE OF DECISION Files of unsuccessful applicants for Mayor's scholarships. Includes application and correspondence.			**ACT+1**
MO-ED-0003-	**MAJOR INITIATIVES - EDUCATION** Correspondence, memoranda and notes regarding the formulation and implementation of Educational programs, projects and initiatives of the Administration			**PRM**
MO-ED-0004-	**EDUCATIONAL FUNDING** Correspondence, memoranda and notes regarding the funding of Educational programs and institutions in the City.			**PRM**

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Sub-Department

/MO/EO/ Executive Offices

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-EO-	**MAYOR'S OFFICE - EXECUTIVE OFFICES**			
MO-EO-0001-	**GENERAL CORRESPONDENCE AND SUBJECT FILES - PERMANENT - CONFIDENTIAL** Correspondence, reports and other documentation received in the course of developing and administering specific projects, initiatives and programs and providing basic City services, or that concern the City's compliance with Law.	**Y**	**Y**	**PRM**
MO-EO-0002-	**MINUTES - CONFIDENTIAL** Minutes of meetings of official committees, commissions, boards and councils indicating date of meeting, names of members present and absent, issues discussed, motions, reports, actions taken and all other records accepted and approved as part of minutes. May include agendas and other supporting documentation.	**Y**	**Y**	**PRM**
MO-EO-0003-	**EXECUTIVE ORDERS** Orders issued by the Office of the Mayor containing directives, policies and procedures for implementation in City government.		**Y**	**PRM**
MO-EO-0004-	**PUBLICATIONS** Works of any kind that are issued by the Mayor's office for distribution to the public.		**Y**	**PRM**
MO-EO-0005-	**PRESS RELEASES** News releases and information released by the Mayor's Press Secretary.		**Y**	**PRM**
MO-EO-0006-	**PRESS CLIPPINGS** Newspaper and magazine articles about activities of the Mayor or events and programs sponsored by the Office of the Mayor.		**Y**	**PRM**
MO-EO-0007-	**PHOTOGRAPHS**			**PRM**

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Sub-Department

/MO/EO/ Executive Offices

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
	(continued from previous page)			
	Includes photographs of City officials, buildings, special events, etc.			
MO-EO-0008-	**APPLICATION FOR PRESS CREDENTIALS - HOLD ON SITE**			**CLO+2**
	Applications by journalists for access to Mayor press conferences and other City Hall events. Credentials must be renewed every two years.			
MO-EO-0009-	**PROCLAMATIONS AND COMMENDATIONS**			**PRM**
	Includes official proclamations relating to events and letters of commendation for employees, citizens and organizations.			
MO-EO-0010-	**OTHER CORRESPONDENCE AND DOCUMENTATION - HOLD ON SITE**			**CLO**
	Other correspondence and documentation not described in this retention schedule and not required to be maintained by law. Retain as long as of administrative value.			

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Sub-Department

/MO/FI/ Finance

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-FI-	**MAYOR'S OFFICE - FINANCE**			
MO-FI-0001-	**BUDGET PREPARATION - HOLD ON SITE** Records created during the process of preparing agency budget request, including cost statements, estimates, justifications, narrative statements, reports and other pertinent data. NOTE: Retention may need to be longer, e.g., until the end of Administration.			**FY+5**
MO-FI-0002-	**PROJECT FUNDING - EVENT DATE REQUIRED** EVENT IS COMPLETION OF PROJECT Records of loans and other funding secured for the implementation and operation of special projects and initiatives of the Administration. NOTE: Retention may need to be longer, e.g., until the end of Administration.			**ACT+10**

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Sub-Department

/MO/FP/ Mayor's Fund for Philadelphia

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-FP-	MAYOR'S OFFICE - MAYOR'S FUND FOR PHILADELPHIA			
MO-FP-0001-	ACCOUNT PROJECT FILES - ARCHIVAL REVIEW REQUIRED BEFORE DISPOSAL Documentation relating to specific projects that promote community and economic development or tourism for the City. File also includes contract copies, financial and progress reports and related correspondence.			CLO+7
MO-FP-0002-	COUNCIL FOR PROGRESS FILES Ledger books and related documentation that provide the history of the Fund for Philadelphia.			PRM

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Sub-Department

/MO/IG/ Inspector General

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-IG-	MAYOR'S OFFICE - INSPECTOR GENERAL			
MO-IG-0001-	CASE FILES - CONFIDENTIAL Investigations of alleged criminal activity such as fraud, corruption, or conflict of interest.	Y		CLO+37

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Sub-Department

/MO/LISC/ L & I Special Commissions

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-LI-	**MAYOR'S OFFICE - L & I SPECIAL COMMISSIONS**			
MO-LI-0001-	**CASE FILES** Investigation case files.			**PRM**
MO-LI-0002-	**REPORTS** Includes final reports.			**PRM**
MO-LI-0003-	**ADMINISTRATIVE** Includes organization structure, members, mission, meeting minutes, budget, expenditures, research and other related information.			**PRM**

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Sub-Department

/MO/OHCD/ Division of Housing and Community Development

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-OH-	MAYOR'S OFFICE - DIVISION OF HOUSING AND COMMUNITY DEVELOPMENT			
MO-OH-0001-	NEIGHBORHOOD PROGRAM CONTRACT FILES - EVENT DATE REQUIRED EVENT IS AUDIT Pre-contract information and correspondence, other related data, financial statements, monthly progress reports, etc.			AUD+5
MO-OH-0002-	SERVICE CONTRACTS - EVENT DATE REQUIRED EVENT IS AUDIT Contracts the Division of Housing has made with outside agencies to perform services			AUD+5
MO-OH-0003-	FINANCIAL DATA - EVENT DATE REQUIRED EVENT IS AUDIT IPA audit reports and related correspondence; financial reports to City agencies and the Division of Housing, letters of credit and grantee performance reports.			AUD+5

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Sub-Department

/MO/PP/ Policy and Planning

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-PP-	MAYOR'S OFFICE - POLICY AND PLANNING			
MO-PP-0001-	POLICY ANALYSIS PAPERS All correspondence, memoranda and notes that go into the formulation of executive orders and directives of an administration			PRM
MO-PP-0002-	SPECIAL PROJECTS AND INITIATIVES All correspondence, memoranda and notes that document the conception, evolution and completion of specific projects and initiatives of an administration.			PRM
MO-PP-0003-	SPECIAL EVENTS Correspondence, memoranda and notes regarding the planning of special events for the City.			PRM
MO-PP-0004-	PROJECT REPORTS Periodic reports tracking status of programs, projects and initiatives of the Administration.			CLO+10

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Sub-Department

/MO/PWD/ People with Disabilities

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-PD-	**MAYOR'S OFFICE - PEOPLE WITH DISABILITIES**			
MO-PD-0001-	**COMPLAINT FILES - EVENT DATE REQUIRED** EVENT IS RESOLUTION OF PROBLEM OR COMPLAINT Records of complaints filed with the City by disabled persons denied access to City facilities			**ACT+4**
MO-PD-0002-	**DISABILITIES ASSISTANCE TRAINING PROGRAM - ARCHIVAL REVIEW REQUIRED BEFORE DISPOSAL** Materials used to conduct training sessions for volunteers who assist the disabled. Includes curriculum, visual aids, handouts			**SUP**

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Sub-Department

/MO/TR/ Transportation

Series ID	*Description*	*Confidential*	*Vital*	*Total Retention Requirement*
MO-TR-	MAYOR'S OFFICE - TRANSPORTATION			
MO-TR-0001-	TRANSPORTATION AUTHORITY LABOR FILES - ARCHIVAL REVIEW REQUIRED BEFORE DISPOSITION Reports, analysis and plans for minimizing the impact to the City of a Transportation System strike			SUP
MO-TR-0002-	TRANSPORTATION AUTHORITY FILES Includes Board minutes, correspondence, fare increase data, budget reports, capital projects, contracts, etc. regarding Transportation Authority			PRM
MO-TR-0003-	PLANNING FILES Includes studies, minutes, program preparation files and contracts for improvement of mass transportation			PRM
MO-TR-0004-	HIGHWAY AND PENNDOT PROJECTS Federal legislation, State budgets, related correspondence, project status reports and related correspondence.			PRM
MO-TR-0005-	TRANSPORTATION FILES - OTHER MODES Policy concerning modes of transportation other than Transportation Authority or automobile such as bicycle, taxi, AMTRAK, CONRAIL, PHLASH, trolleys, ferries and air. Includes correspondence, complaints, legislation, procurement issues and annual reports.			PRM
MO-TR-0006-	TRANSIT SHELTER PROJECTS Project files on public transportation shelter sites for passengers, including advertisements used at these shelter sites. File includes shelter requests, site drawings, easements, rental revenue reports, contract copies, copies of specifications and related correspondence			PRM

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